

ACQUISITION PLAN

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Project Profile

Although most commonly associated with contracts, each procurement action in the Purchasing and Contracting subsystems can have a project profile that outlines the characteristics and milestones of the procurement. Once a procurement request is submitted and assigned to a contract specialist, a project profile can be created.

CSTARS Desktop

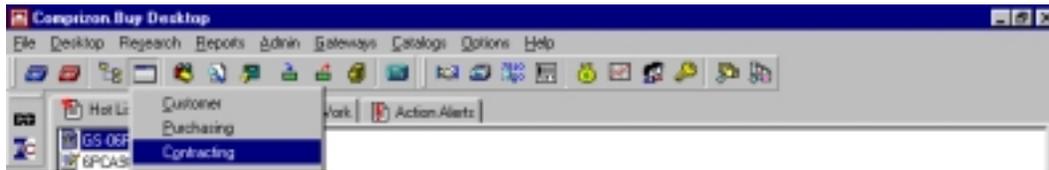


Figure 1

From the CSTARS desktop, click on the  icon. Select either "Purchasing" or "Contracting," and the appropriate worksheet will appear.

Purchasing or Contracting Worksheet

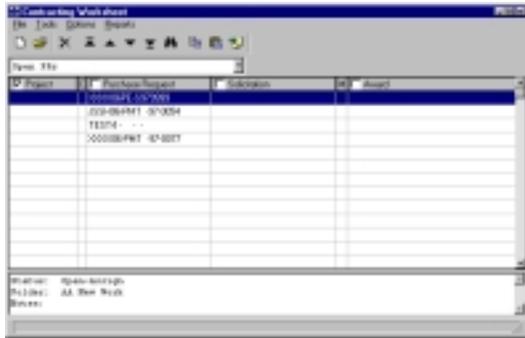


Figure 2

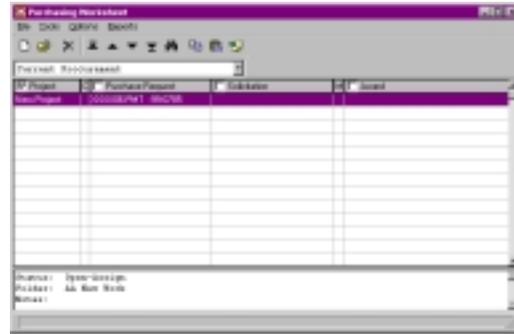


Figure 3

At the worksheet, highlight the appropriate purchase request number and click on the “Project” check box. A checkmark will display in the check box. Select "File" from the menu bar then select "New" from the drop-down menu. Or click the  icon to display the *New Project Summary Screen*. The following screen will appear:

New Project Summary Screen

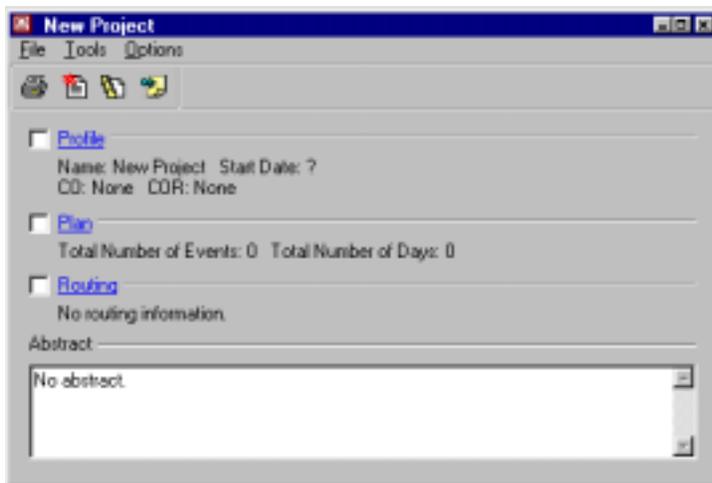


Figure 4

From the *New Project Summary Screen*, click on the blue [Profile](#) hypertext link.

Procurement Milestone Tab Control Screen

Profile Screen

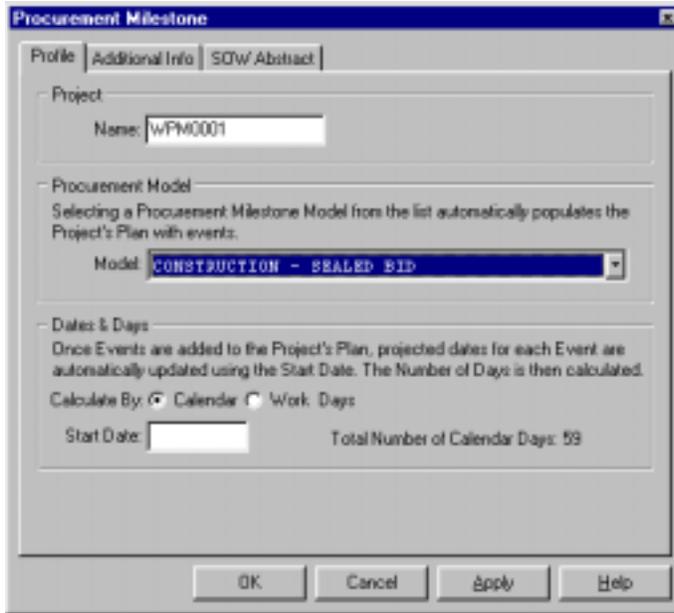


Figure 5

Press the <TAB> key to move through each field.

Project Name:	Enter project title or number.
Model:	Select a procurement model name from the drop-down box.
Calculate By:	Select either "Calendar" or "Work Days."
Start Date:	Enter the date from which all events will be calculated.



Note: When selecting a model name, some fields may default, based on the model name. If the Procurement Milestone Plan is modified, "Calendar Days" or Work Days" may change.

Click on the *Additional Info* tab, and the *Additional Info Screen* will appear.

Additional Info Screen

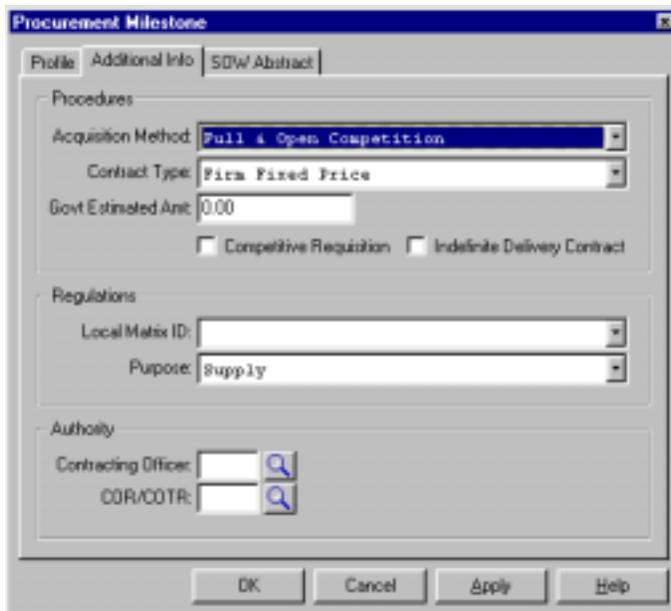


Figure 6

Acquisition Method:	This field may default, based on the model name. Click on the drop-down box to change the default Acquisition Method.
Contract Type:	This field will default to the model name selected. Click on the drop-down box to change the default contract type.
Govt. Estimated Amt:	Enter the estimated contract value, inclusive of options. The maximum value is \$999,999,999.99.
Competitive Requisition (check box):	If this is a competitive procurement, check the box when applicable.
Indefinite Delivery Contract (check box):	If this is an indefinite delivery, check the box when applicable.
Local Matrix ID:	This field defaults based on the model name. Click on the drop-down arrow to change the default local matrix ID.
Purpose:	This field defaults based on the model name. Click on the drop-down arrow to change the default purpose.
Contracting Officer:	Click on the  icon to select the appropriate Contracting Officer.
COR/COTR:	Click on the  icon, select the appropriate Contracting Officer's Rep.



Note: If a Contracting Officer's name does not appear on the list, contact the Systems Administrator.

Click on the *SOW Abstract* tab and the *SOW Abstract Screen* will appear.

SOW Abstract

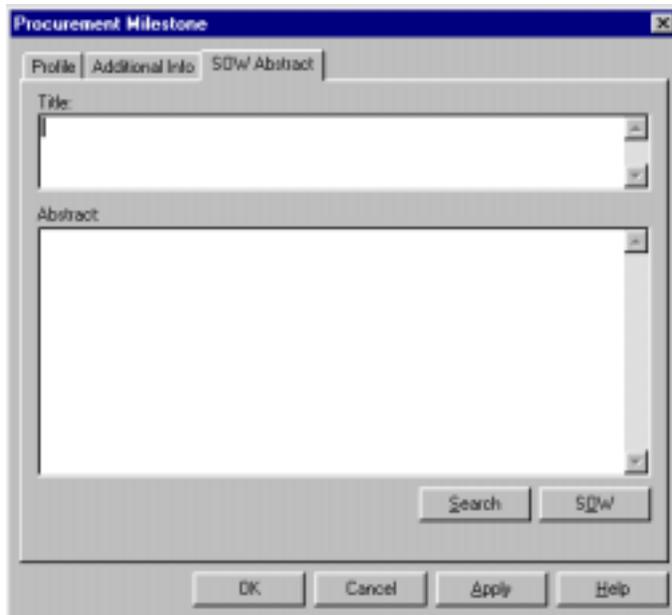


Figure 7

In the *Title* block, enter a description of the project, i.e., “Janitorial Services, Federal Office Building, Manchester, NH.” Then enter text within the *Abstract* block. This is a summary of the SOW. If you want to add a long text saved in another document or save a text you create here to a MS Word document, right click the mouse to access the *Dump* or *Load* feature from the drop-down menu. (For more information on using the *Dump* or *Load* features, see the *Introduction* chapter.)

From this screen, you can also attach the full SOW as a supporting document if you prefer. To do this, click on the *SOW* button and following the instructions for using the *Supporting Documentation Tab Control Screen* in the *Attaching Support Documents* section, later in this chapter.

After entering the appropriate information, click on the  button and return to the *Project Summary Screen*.

Project Summary Screen

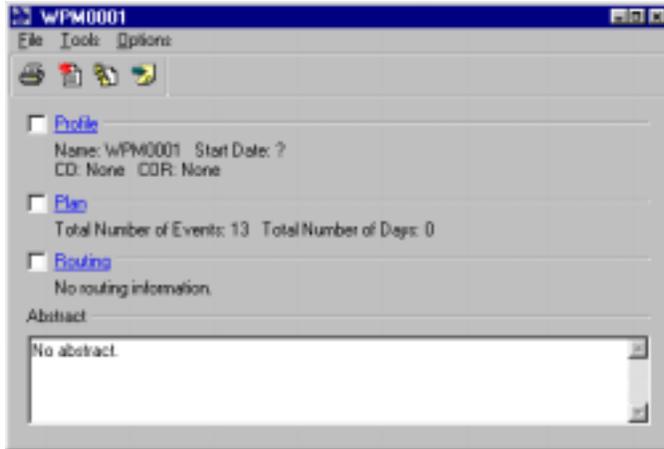


Figure 8

Viewing a Procurement Milestone Plan

The Plan function establishes and maintains a Procurement Milestone Plan (a list of procurement milestones) for the selected project. Milestone events can be individually added, using the Plan function, or a pre-established list can be copied from the Procurement Model. A project profile or procurement milestone plan contains the specific milestones associated with a particular acquisition. A Procurement model is a master set of events that can be applied and tailored as a Project Profile to a specific acquisition. At the *Project Summary Screen*, click the [Plan](#) hypertext link to display the *Procurement Milestone Plan Browser*.

Procurement Milestone Plan Browser

No.	Event Name	Follows	Proj Days	Proj Date	Rev Days	Rev Date	Actual Date	File
10	*Verify Funds		0					
20	ACCEPT REQUIREMENTS PACKAGE	10	2					
30	SB SET-ASIDE WAIVER REQUESTED	20	1					
40	SB SET-ASIDE WAIVER RECEIVED	40	5					
50	ACQUISITION PLAN APPROVED	40	5					
60	*Issue Award CBD	50	1					
70	PUBLISH CBD SYNOPSIS	30	5					
80	PROSOLICITATION NOTICE ISSUED	50	3					
90	*Issue Solicitation	30	11					
100	PRE-BID CONFERENCE	30	11					
110	BID OPENING DATE	100	22					
120	*Issue Award	110	22					
130	NTP/EFFECTIVE DATE	110	11					

Figure 9

If a procurement model was selected on the *Profile Screen*, the model will display. If changes are required, see the next section entitled *Maintaining A Procurement Milestone Plan*.

Maintaining a Procurement Milestone Plan

Procurement Milestone Plan Browser

No.	Event Name	Follows	Proj Days	Proj Date	Rev Days	Rev Date	Actual Date	File
10	*Vesly Funds	0	0					
20	ACCEPT REQUIREMENTS PACKAGE	10	2					
30	SB SET-ASIDE WAMER REQUESTED	20	1					
40	SB SET-ASIDE WAMER RECEIVED	40	5					
50	ACQUISITION PLAN APPROVED	40	5					
60	*Issue Award CBD	50	1					
70	PUBLISH CBD SYNOPSIS	30	5					
80	PRESOLICITATION NOTICE ISSUED	50	3					
90	*Issue Solicitation	30	11					
100	PRE-BID CONFERENCE	30	11					
110	BID OPENING DATE	100	22					
120	*Issue Award	110	22					
130	NTP/EFFECTIVE DATE	110	11					

Enter data or press ESC to end.

Figure 10

To maintain a specific event on your Procurement Milestone Plan, highlight the appropriate sequence number and double click. The *Event Maintenance Tab Control Screen* will display.

Event Maintenance Tab Control Screen

Event Screen

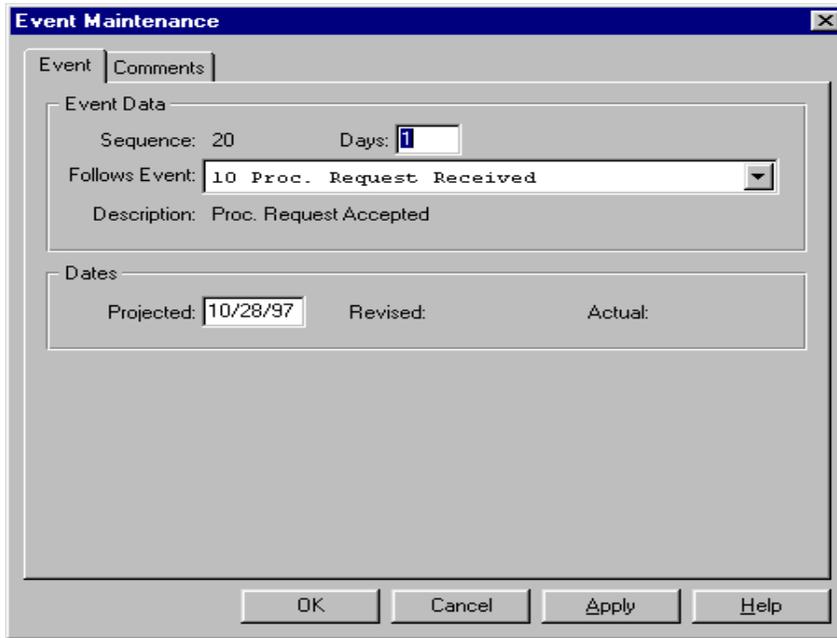


Figure 11

Press the <TAB> key to move through each field.

Days:	Enter the number of days allowed for event completion.
	OR
Projected:	Enter a revised projected date.
Follows Event:	From the drop-down menu, select the sequence number of the event that this event should follow.
Description:	The description text displays as the “Event” name. This field is view only.



Note: The system counts by calendar days.

Click on the *Comments* tab and the *Comments Screen* will appear.

Comments Screen

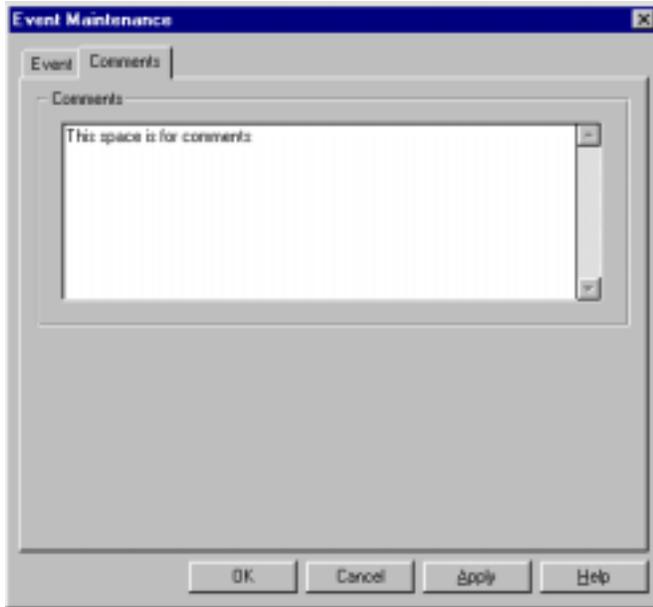


Figure 12

Enter any comments, and click on  to return to the *Procurement Milestone Plan Browser*.

Adding a New Event

Procurement Milestone Plan Browser

No.	Event Name	Follows	Proj Days	Proj Date	Rev Days	Rev Date	Actual Date	File
10	*Vesly Funds	0	0					
20	ACCEPT REQUIREMENTS PACKAGE	10	2					
30	SB SET-ASIDE WAMER REQUESTED	20	1					
40	SB SET-ASIDE WAMER RECEIVED	40	5					
50	ACQUISITION PLAN APPROVED	40	5					
60	*Issue Award CBD	50	1					
70	PUBLISH CBD SYNOPSIS	30	5					
80	PRESOLICITATION NOTICE ISSUED	50	3					
90	*Issue Solicitation	30	11					
100	PRE-BID CONFERENCE	30	11					
110	BID OPENING DATE	100	22					
120	*Issue Award	110	22					
130	NTP/EFFECTIVE DATE	110	11					

Figure 13

If you desire to keep a record of both the originally established milestone as well as any revisions, apply the "Tools" and "Refreeze" option to the plan when it has been developed. Any subsequent changes that are applied will be reflected under the "Rev Days" and "Rev Date" columns.



Note: For more details, see the section "Freezing Original Projected Dates on the Procurement Milestone Plan" in this chapter.

All events on an individual Plan are sequenced in increments of ten, so users may insert events in between already established events. For example, to add an event to the Procurement Milestone Plan between sequence numbers

“10” and “20,” click the  icon. The *Event Maintenance Tab Control Screen* will display with the next sequential event number.

Event Maintenance Tab Control Screen

Event Screen

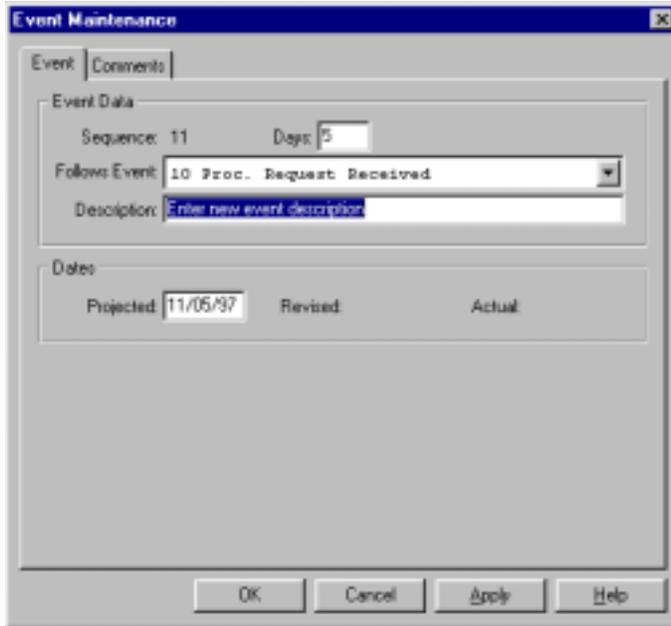


Figure 14

Press the <TAB> key to move through each field.

Days:	Enter the number of days allowed for event completion.
	OR
Projected:	Enter a revised projected date.
Follows Event:	From the drop-down menu, select the sequence number of the event that this event should follow.
Description	Enter a new event description.

Click on the *Comments* tab, and the *Comments Screen* will appear.

Comments Screen

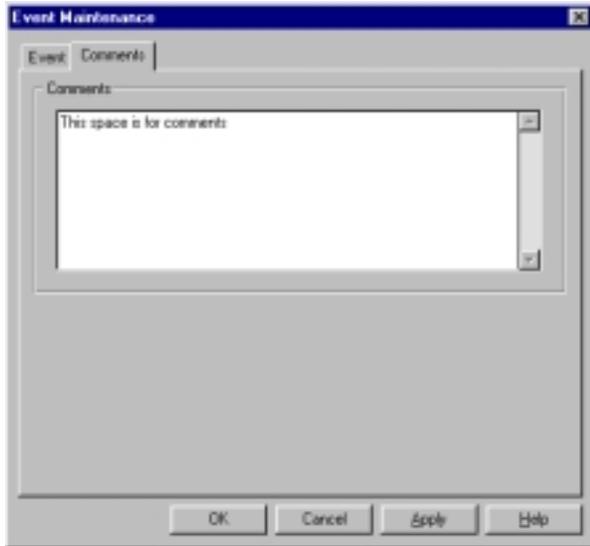


Figure 15

Enter any comments and click on the  button and return to the *Procurement Milestone Plan Browser*. If the "Tools" and "Freeze" option has been applied to the Procurement Plan, you must first apply "Tools" and "Unfreeze" before making any subsequent changes to the Events list.



Warning: If "Unfreeze" is applied and new events added to a procurement plan after revised event dates have been included, the revised event dates may be lost from the original procurement plan.



Note: For more details, see the section "Freezing Original Projected Dates on the Procurement Milestone Plan" in this chapter.

Adding a New Event from the Master Event List

The *Master Event List Browser* displays all events available in the system. For example, to add an event to the Procurement Milestone Plan from the *Master Event List Browser* between sequence numbers "20" and "30," highlight the sequence "20" and select "File" from the menu bar and choose "Master List" from the drop-down menu.

Procurement Milestone Plan Browser

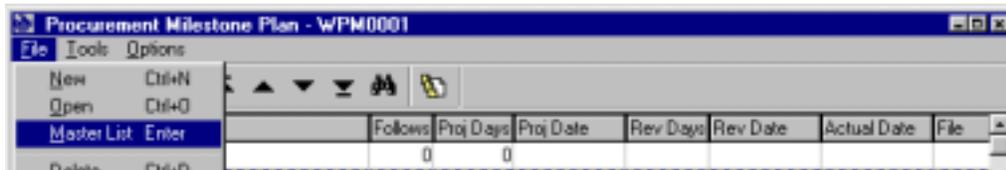


Figure 16

The *Master Event List Browser* will display.



Note: If an event needs to be added to the Master Event List Browser, contact the Systems Administrator.

Master Event List Browser



Figure 17

Using the vertical scroll bar, highlight the appropriate event, select "File" from the menu bar and click *Select*. The *Event Screen* of the *Event Maintenance Tab Control Screen* will display.

Event Maintenance Tab Control Screen

Event Screen

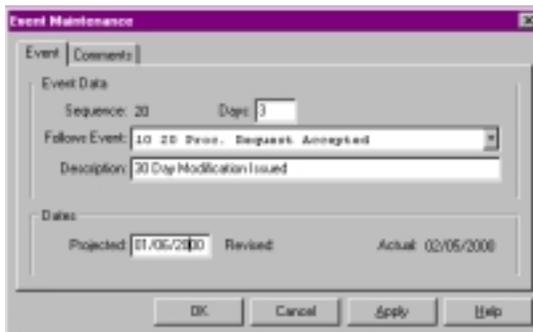


Figure 18

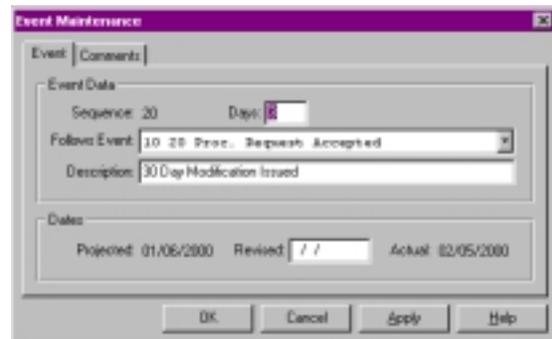


Figure 19

Press the <TAB> key to move through each field.

Days:	Enter the number of days allowed for event completion.
	OR
Projected:	Enter a revised projected date (if the Plan is frozen).
Follows Event:	From the drop-down menu, select the sequence number of the event that this event should follow.
Description	Edit the description, if necessary.

Click on the *Comments* tab, and the *Comments Screen* will display.

Comments Screen

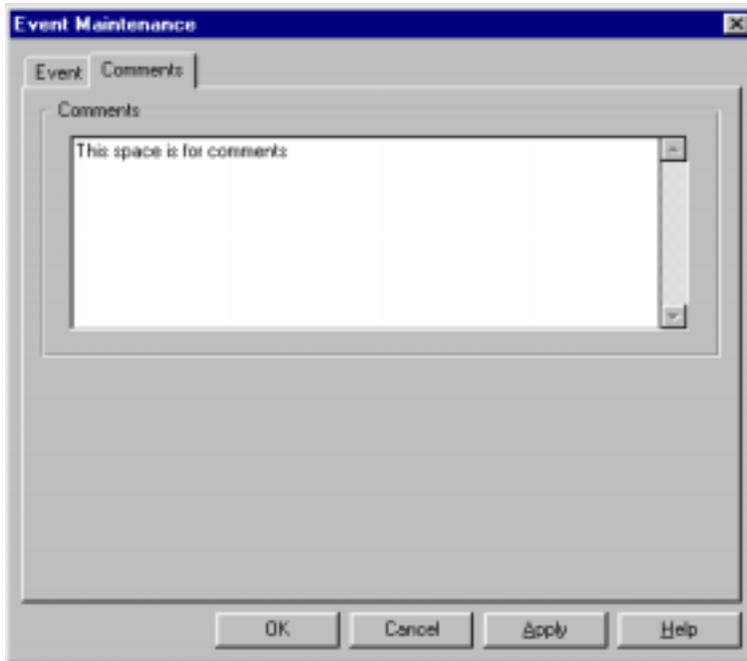


Figure 20

Enter any comments and click the  button to return to the *Procurement Milestone Plan Browser*.

Deleting an Event from the Procurement Milestone Plan

To delete an event from the *Procurement Milestone Plan Browser*, highlight the appropriate sequence number.

 *Note: If "Tools" and "Freeze Option" have been applied, an event cannot be deleted.*

Procurement Milestone Plan Browser

No.	Event Name	Follows	Proj Days	Proj Date	Rev Days	Rev Date	Actual Date	File
10	*Vestly Funds	0	0					
20	ACCEPT REQUIREMENTS PACKAGE	10	2					
30	SB SET-ASIDE WARNER REQUESTED	20	1					
40	SB SET-ASIDE WARNER RECEIVED	40	5					
50	ACQUISITION PLAN APPROVED	40	5					
60	*Issue Award CBD	50	1					
70	PUBLISH CBD SYNOPSIS	30	5					
80	PRESOLICITATION NOTICE ISSUED	50	3					
90	*Issue Solicitation	30	11					
100	PRE-BID CONFERENCE	30	11					
110	BID OPENING DATE	100	22					
120	*Issue Award	110	22					
130	NTP/EFFECTIVE DATE	110	11					

Figure 21

Click on the  icon. A *Question Dialogue Box* will appear.

Question Dialogue Box

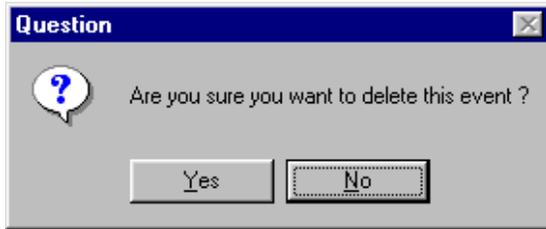


Figure 22

To confirm the delete process, click on the button, or, to cancel the delete process, click the button. CSTARS returns to the *Procurement Milestone Plan Browser*.

Resequencing Events on the Procurement Milestone Plan

To resequence all events on the Procurement Milestone Plan with an increment of ten, select "Tools" from the menu bar and choose "Resequence" from the drop-down menu.

Procurement Milestone Plan Browser

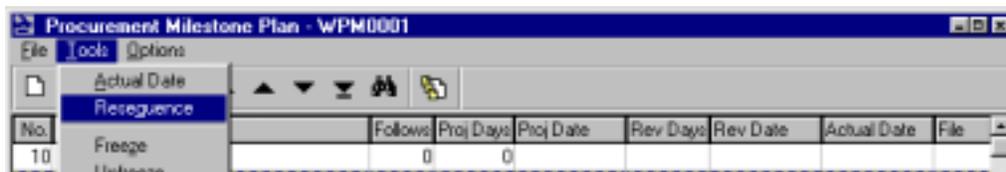


Figure 23

A *Question Dialogue Box* will display.

Question Dialogue Box

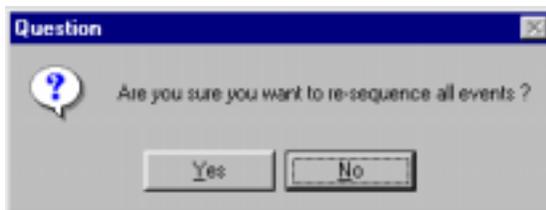


Figure 24

To confirm the resequencing process, click the button. To cancel the resequencing process, click the button. CSTARS returns to the *Procurement Milestone Plan Browser*.

Freezing Original Projected Dates on the Procurement Milestone Plan

To freeze original projected dates on the Procurement Milestone Plan as the project baseline, select "Tools" from the menu bar and choose "Freeze" from the drop-down menu.

Procurement Milestone Plan Browser

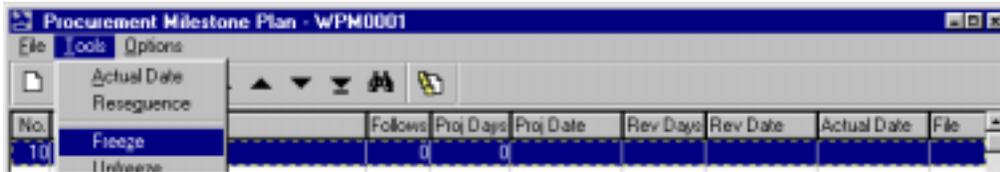


Figure 25

A *Question Dialogue Box* will appear.

Question Dialogue Box

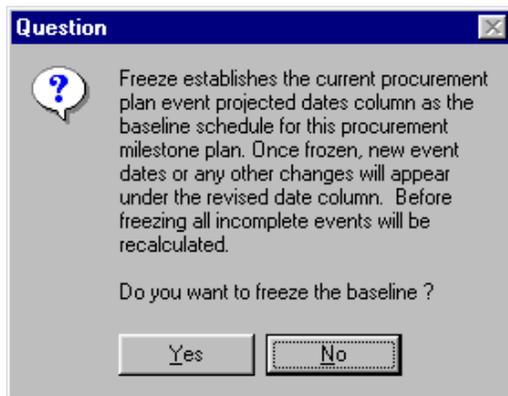


Figure 26

To confirm the freeze process, click on the button. To cancel the freeze process, click on the button. Freezing dates locks up any dates established in the “Proj Date” column of the *Procurement Milestone Plan Browser*. If it is necessary to change dates while in the frozen stage, new dates will appear in the revised date column.

Procurement Milestone Plan Browser

No.	Event Name	Follows	Proj Days	Proj Date	Rev Days	Rev Date	Actual Date	File
10	*Verify Funds	0	0	11/01/1999				
20	ACCEPT REQUIREMENTS PACKAGE	10	2	11/03/1999				
30	SB SET-ASIDE WAIVER REQUESTED	20	1	11/04/1999				
40	SB SET-ASIDE WAIVER RECEIVED	40	5					
50	ACQUISITION PLAN APPROVED	40	5					
60	*Issue Award CBD	50	1					
70	PUBLISH CBD SYNOPSIS	30	5	11/09/1999	7	11/11/1999		
80	PRESOLICITATION NOTICE ISSUED	50	3					
90	*Issue Solicitation	30	11	11/15/1999				
100	PRE-BID CONFERENCE	30	11	11/15/1999				
110	BID OPENING DATE	100	22	12/07/1999				
120	*Issue Award	110	22	12/29/1999				
130	NTP/EFFECTIVE DATE	110	11	12/18/1999				

Figure 27

In the screen below the “Proj Date,” the column has been frozen. A revised date was entered for the solicitation amendment event and that date now appears in the “Rev Date” column. Upon award of the solicitation, a date may also be entered for the “Actual Date” column.

Unfreezing Original Projected Dates on the Procurement Milestone Plan

Click on "Tools" from the menu and "Unfreeze" from the drop-down menu. The following *Question Dialog Box* will display:

Question Dialog Box

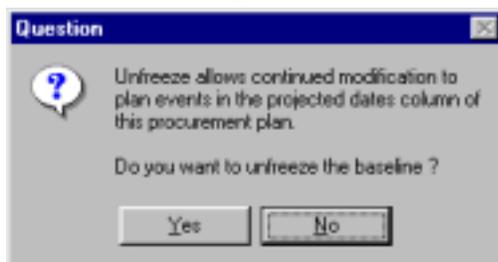


Figure 28

To confirm the unfreeze process, click the  button. To cancel the unfreeze process, click the  button. Freezing dates in the “Proj Date” column of the *Procurement Milestone Plan Browser* allows continued modification of the dates in the “Proj Date” column of the Plan only.



Warning When you unfreeze the plan to add new events, CSTARS updates the “Proj Date” column with any revisions made in the “Rev Date” column unless an “Actual Date” was also entered, in which case, CSTARS retains the “Proj Date” and the “Rev Date” that was entered during the freeze process.

Attaching Supporting Documents

The *Supporting Documentation Browser* enables users to attach individual documents to the Acquisition Plan, such as Determinations and Findings (D&Fs). These can then be routed for Review and Approval and submitted to the Contracting Office along with the Procurement Milestone Plan.

In order to route supporting documents (Determinations and Findings, Justifications, Wage Determinations, CD570's) with the Procurement Milestone Plan, they must be saved in a shared directory specified by the System's Administrator.

Procurement Milestone Plan Browser

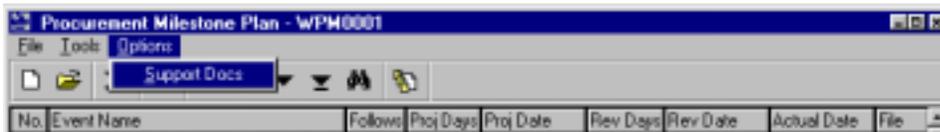


Figure 29

From the *Procurement Milestone Plan Browser*, select “Options” from the menu bar and select “Support Docs” from the drop-down menu. The *Supporting Documentation Browser* will appear.

Supporting Documentation Browser

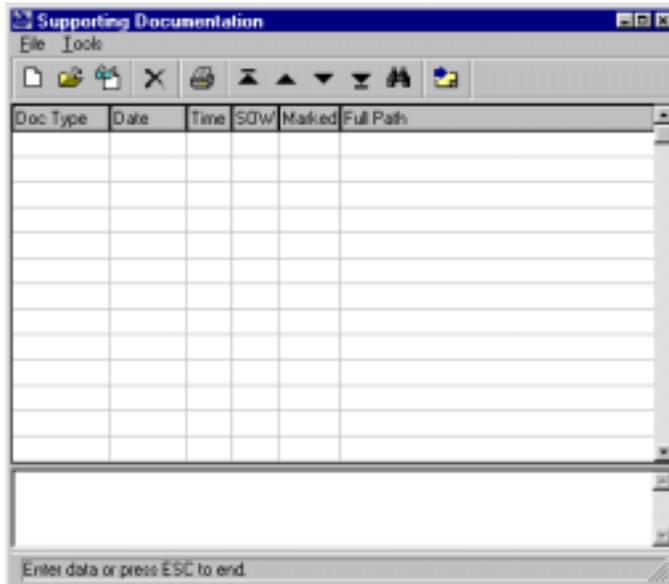


Figure 30

Click on the  icon, and the *Location Screen* of the *Supporting Documentation Tab Control Screen* will appear.

Supporting Documentation Tab Control Screen

Location Screen

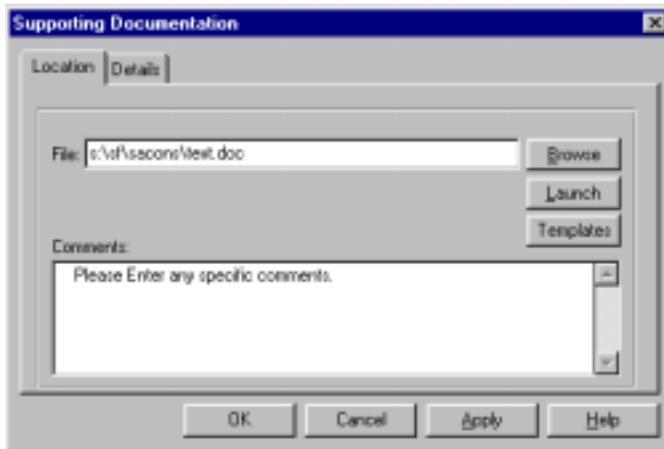


Figure 31

Press the <Tab> key to move through each field.

Document File:	Enter a valid path name to a file to be attached (Example: s:\sf\sacons\text.doc).
	OR
Browse:	Click on the <i>Browse</i> button to view available file paths and files.
Launch:	Click on the <i>Launch</i> button to open the file.
Templates:	 See the System's Administrator and bureau-specific guidance for available templates.
Comments:	Enter a brief document description (up to 325 characters available).



See Addendum: See bureau-specific addendum instructions for templates.

Click on the *Details* tab, and the *Details Screen* will appear.

Details Screen

Procurement Milestone Plan Browser

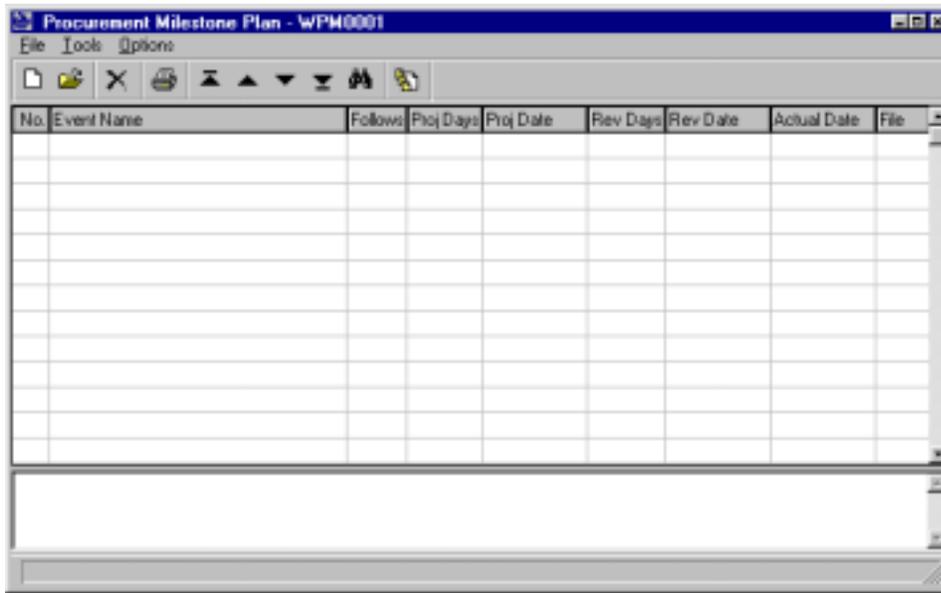


Figure 34

Printing the Procurement Milestone Plan

From the *Procurement Milestone Plan Browser*, select "File" from the menu bar and choose "Print" from the drop-down menu.

Procurement Milestone Plan Browser

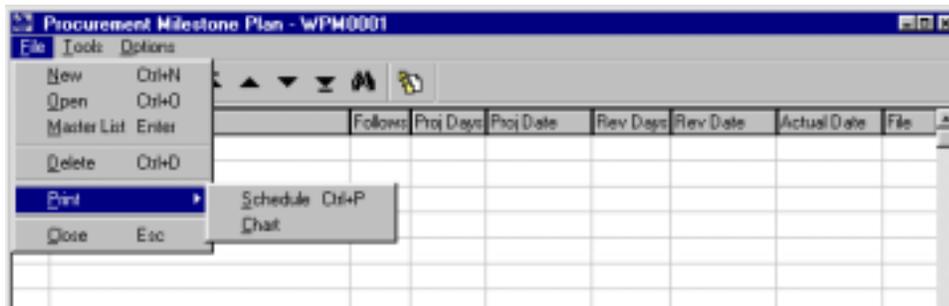


Figure 35

The following print options are available:

Schedule:	Print a schedule of the Procurement Milestone Plan. [Recommended]
Chart:	Print a Gantt-type chart (timeline) for the selected procurement model.

Question Dialog Box

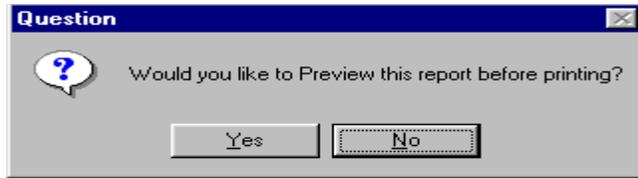


Figure 36

If *Yes* is selected, the report can be previewed before printing. If *No* is selected, the report is printed without being previewed.

Print Preview Screen

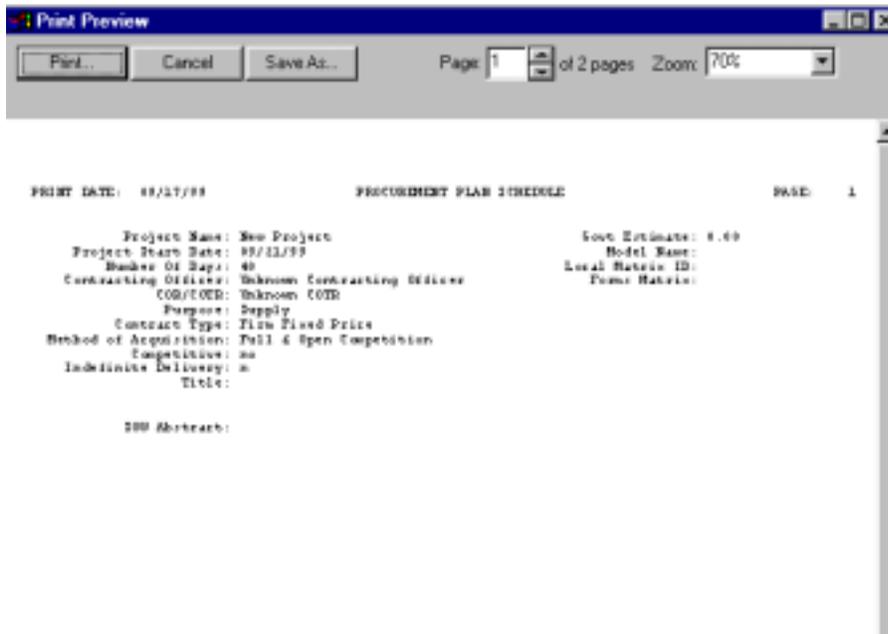


Figure 37

After previewing the report, click on the *Print* button to print, otherwise, select the *Cancel* button to return to the Procurement Milestone Plan. Click on the upper right-hand corner  to return to the *Project Summary Screen*.



Warning In the Gantt Chart view, the schedule may not reflect changes resulting from the addition of new events.

Routing the Procurement Milestone Plan

This option submits a procurement plan for Review and Approval to a list of designated procurement personnel who have been selected to perform this duty. While in the routing process, the procurement plan can only be displayed, not edited in any way. Only the user/initiator can add a reviewer/approver to a route list, edit a selected route entry, delete a selected route entry from the route list, release a procurement plan to a route list, review comments provided by selected reviewers, or print the route list and status.

To route a procurement plan, open the plan, then click on the [Routing](#) hypertext link on the *Summary Screen*.



Note: You can route the Procurement Milestone Plan to anyone with a user ID in CSTARS.



Note: For a more detailed discussion of routing, see the section title "Routing a Requisition for Review and Approval" in the Requisitions chapter, earlier in the book.

Inputting Actual Dates into the Procurement Milestone Plan

To record the actual beginning and ending dates for highlighted events on the *Procurement Milestone Plan Browser*, highlight the event you wish to update. Select "Tools" from the menu bar and choose "Actual Date" from the drop-down menu.

Procurement Milestone Plan Browser

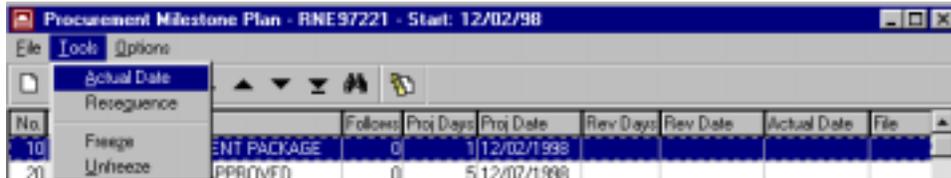


Figure 38

The *Completion Information Prompt Box* will be displayed.

Completion Information Prompt Box

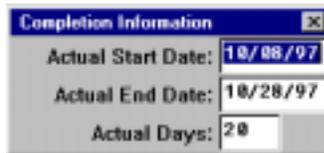


Figure 39

Press the <Tab> key to move through each field.

Actual Start Date:	Enter the date the event began.
Actual End Date:	Enter the date the event was completed.
Actual Days:	Enter the number of days it took to complete the event.

After entering the appropriate information, press the <F2> key to save changes and return to the *Procurement Milestone Plan Browser*. Use the <Esc> key on the keyboard to cancel the screen. Repeat the process for other events. After entering all the actual beginning and ending dates, click on icon in the upper right-hand corner, or select "File" from the menu bar and "Close" from the drop-down menu, to return to the *Contracting Worksheet*.